

# EMPLOYER BULLETIN

## Annual Report Reminder and MIBD Form Instructions

July 2006

### Overview

This bulletin contains information about

- filing the Employer's Annual Report of Earnings, and
- distributing the enclosed Member Information and Beneficiary Designation (MIBD) form.

For questions about the Employer's Annual Report of Earnings form, call the Employer Services Department at (888) 877-0890, option 1. Direct questions about the MIBD form to the Counseling Services Department at (800) 877-7896.

### Employer's Annual Report of Earnings

#### Filing deadline

The filing deadline for the 2005-2006 annual report for the 2005-2006 school year is **August 15, 2006**. A \$250-per-day, late-filing penalty will be assessed for each day past the August 15 deadline that the report is not on file at TRS.

TRS uses the postmark date as the date of receipt. Any postmark made by any entity other than the U.S. Post Office, such as a private mailing machine, must show a date on or before August 15, 2006, **and** must be received in the Springfield office no later than four working days after August 15. Employers should check to make sure their envelope is properly addressed and contains sufficient postage to ensure that the report reaches the Springfield office on time.

#### Annual Reporting System

Employers must file the 2005-06 Employer's Annual Report of Earnings via the 2006 version of the Annual Reporting System (ARS) software if they have 50 or more contributing members.

Follow the 2006 version instructions in the ARS booklet, which was mailed to all employers in June with the annual report packets, to update the annual report information.

When the annual report packets were being mailed, it was discovered that the 2006 version encounters an error during the attempted installation of the Microsoft Access 2000 runtime files associated with the program on machines that do not contain Microsoft Access 2000 or Microsoft Access 2000 runtime files. Machines with earlier or later versions of Microsoft Access or Access runtime files would not allow the actual installation of the ARS software.

After sending an e-mail message to alert all employers, TRS mailed an additional "patch" CD containing Microsoft Access 2000 runtime files to all employers to fix the problem.

#### Incomplete reports

TRS is unable to accept reports without all the required information. Reports submitted to TRS with incomplete information will be returned, will be subject to the late-filing penalty described above, and will be deemed "not received" until properly completed and returned to the Springfield office.

### Member Information and Beneficiary Designation (MIBD) form

The Member Information and Beneficiary Designation (MIBD) form provides TRS with valuable demographic information, is used to initiate a new member's account, and it establishes or changes a member's beneficiary designation in the event of his or her death.

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When a new teacher is hired who has never participated in TRS, please be sure the teacher completes a MIBD form. If a new teacher is hired who already has service on record with TRS, it is not necessary to have them fill out another MIBD form. Once membership has been established with TRS, a new MIBD form is only necessary if the teacher wants to change the beneficiary designation.

**Please note that teachers do not indicate the names of the school districts in which they are employed on the MIBD form.** Consequently, please ask new substitute teachers if they have prior TRS service or recently completed a MIBD form provided by another school district before asking them to complete a MIBD form.

It is preferable for a teacher to complete a Change of Address form, which can be filled in and printed from our Web site, instead of a MIBD form for a change in address. If the teacher chooses to use the MIBD form for an address change, the form must be completed fully, even if the beneficiary designation is the same.

The MIBD form can be used to notify TRS of a change in a teacher's name. The MIBD form should be completed fully, even if it is just a name change. TRS can also take an active teacher's name change in writing from the teacher.

It is important that the teacher or district mail the MIBD form as soon as the teacher completes it to ensure that the mailing address and beneficiary designation for the member is current on the TRS computer system. **Please do not hold the form until the fall.**

If a teacher asks their employer to mail the MIBD form for them, the employer should check to see that the MIBD form has been completed, signed, and dated.

Then the employer should mail the **original** form to TRS at:

Teachers' Retirement System  
2815 West Washington  
P.O. Box 19253  
Springfield, Illinois 62794-9253

Please do not duplicate MIBD forms. If employers need additional forms, please contact the Employer Services Department at (888) 877-0890.